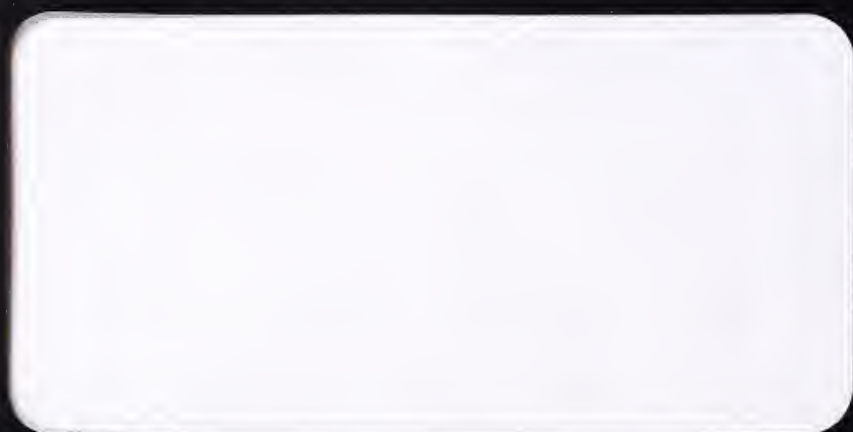


Outsourcing et
Intégration de Systèmes :
Perspectives Actualisées
des Marchés

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**Systems Integration/Professional Services
Programme—Europe**
(SIP)

**Outsourcing Information Systems
Programme—Europe**
(OSP)

***Outsourcing et Intégration de Systèmes :
Perspectives Actualisées des Marchés***

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Evolution of the Systems Integration Market

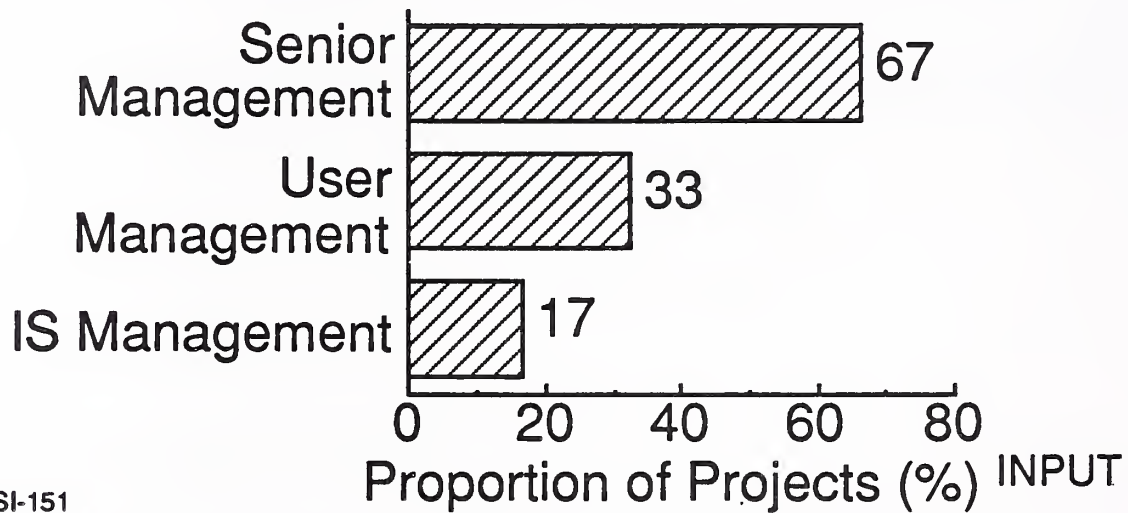
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Notes

Systems Integration

Identifier of Major Projects France



E-SI-151

Notes

Systems Integration

Characteristics Required of Vendors

- Relevant skills/software
- Financial strength to absorb risk
- Prior experience of similar projects
- Responsiveness

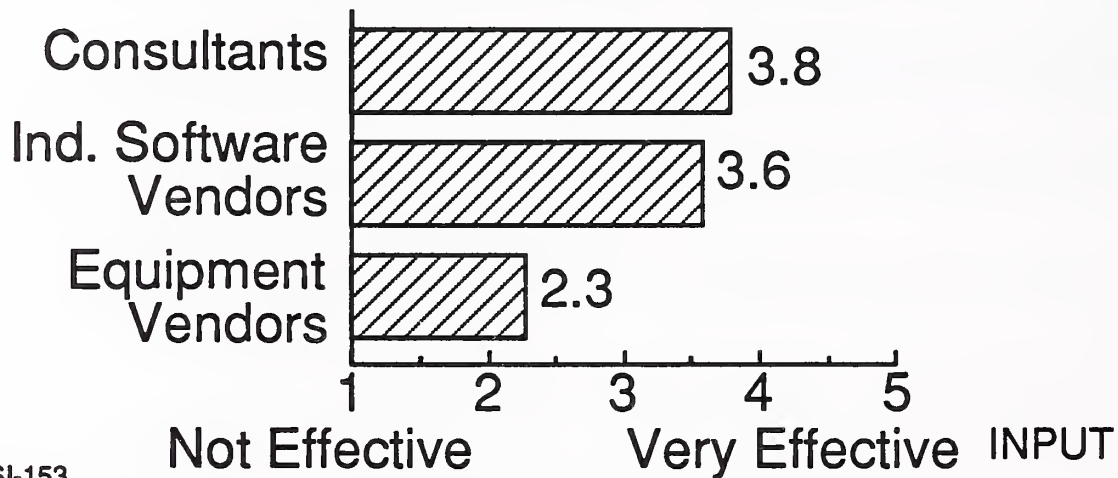
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Notes

Systems Integration

Ability to Manage Large Projects User Perspective, France

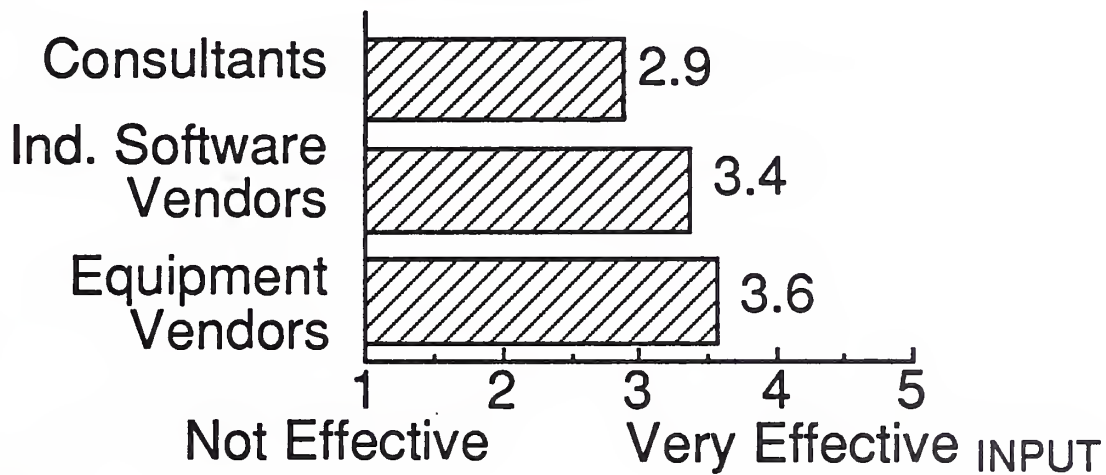


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Notes

Systems Integration

Ability to Manage Projects User Perspective, U.K.

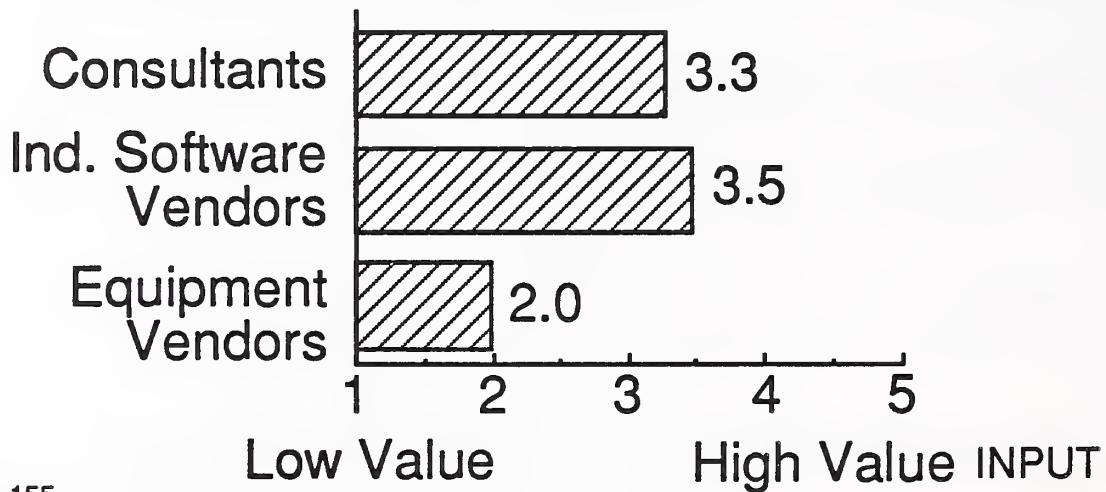


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Notes

Systems Integration

Value for Money—Projects User Perspective, France

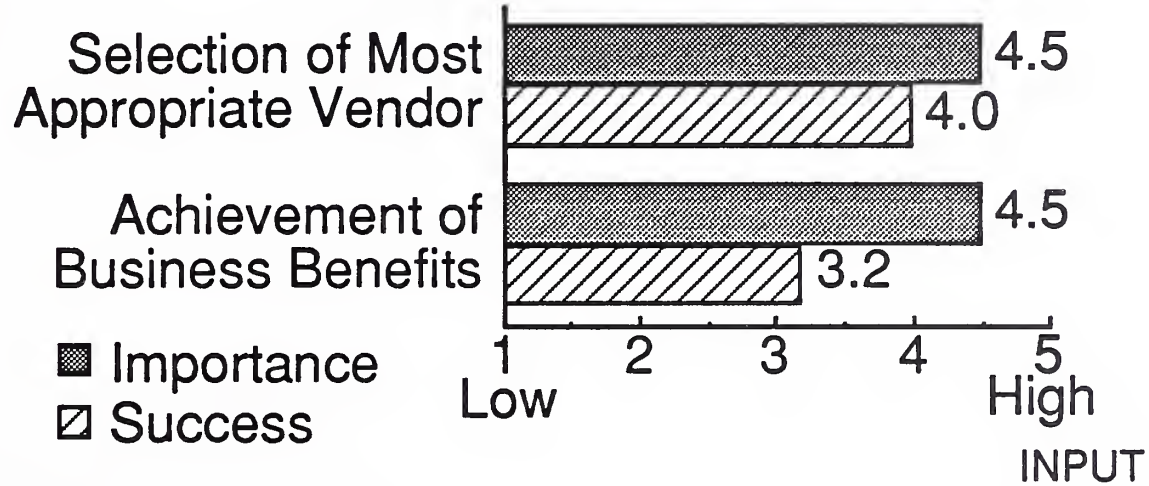


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Notes

Systems Integration

Achievement of Project Objectives

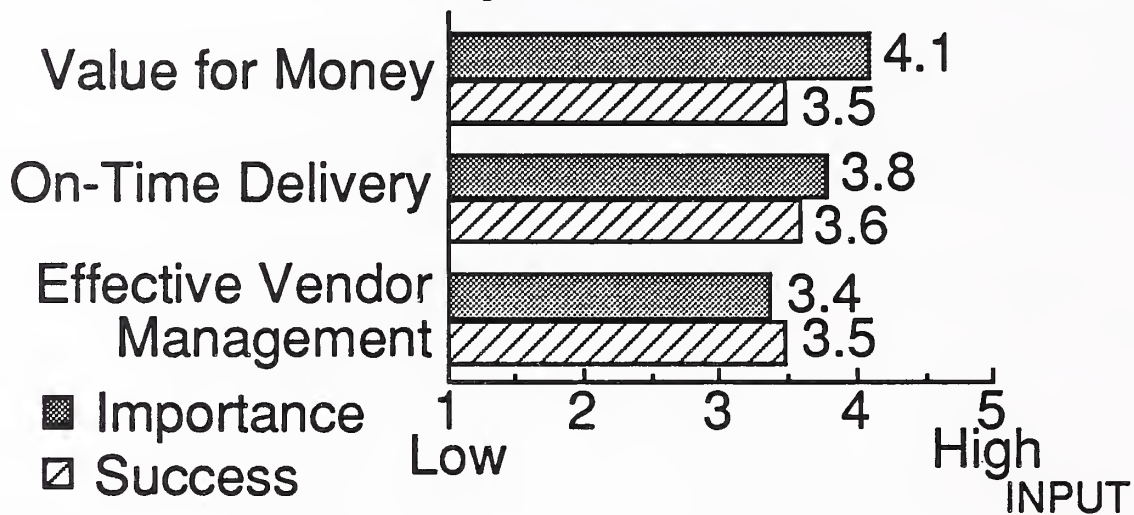


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Notes

Systems Integration

Achievement of Project Objectives



E-SI-157

Notes

Systems Integration

Purchasing Process: Workflow

Stage	Key Influences
Decision to investigate workflow	Senior executives Department heads O&M/business strategy

E-SI-158

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Notes

Systems Integration

Purchasing Process: Workflow

Stage	Key Influences
Vendor identification/ information collection	IS department External consultants
Trial go/no go decision	Departmental heads Operational management

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Notes

Systems Integration

Market Segmentation, 1992 Europe

	Share of Total Market (%)	Value (\$B)
Networking/Infrastructure Development	27	1.10
Appl./Business Solutions	73	2.97
Total	100	4.07

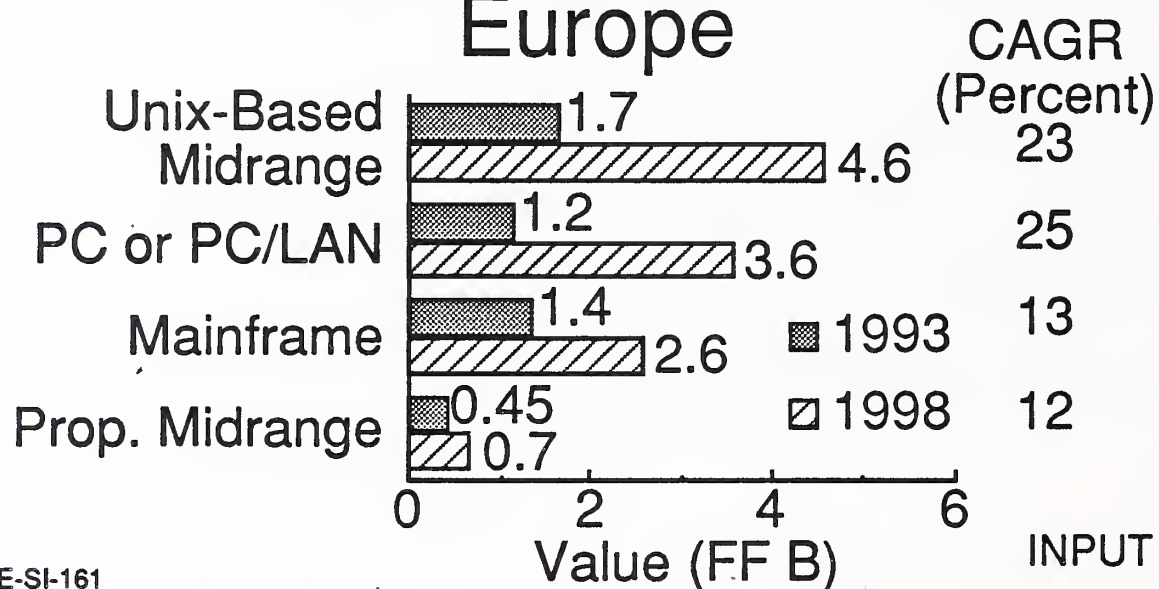
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Notes

Systems Integration

Projects by Equipment Type Europe

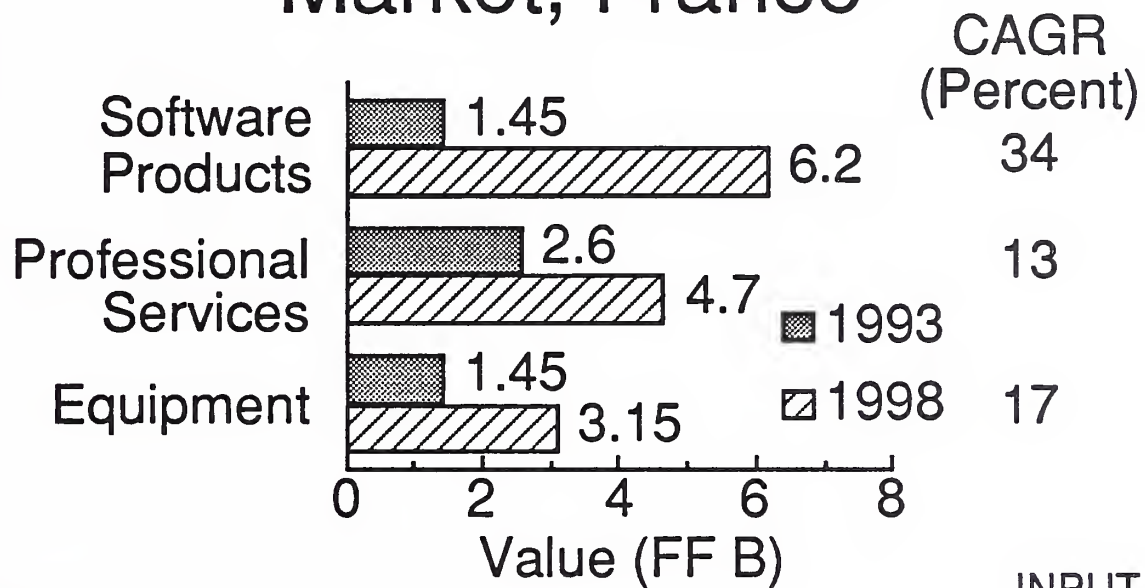


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Notes

Systems Integration

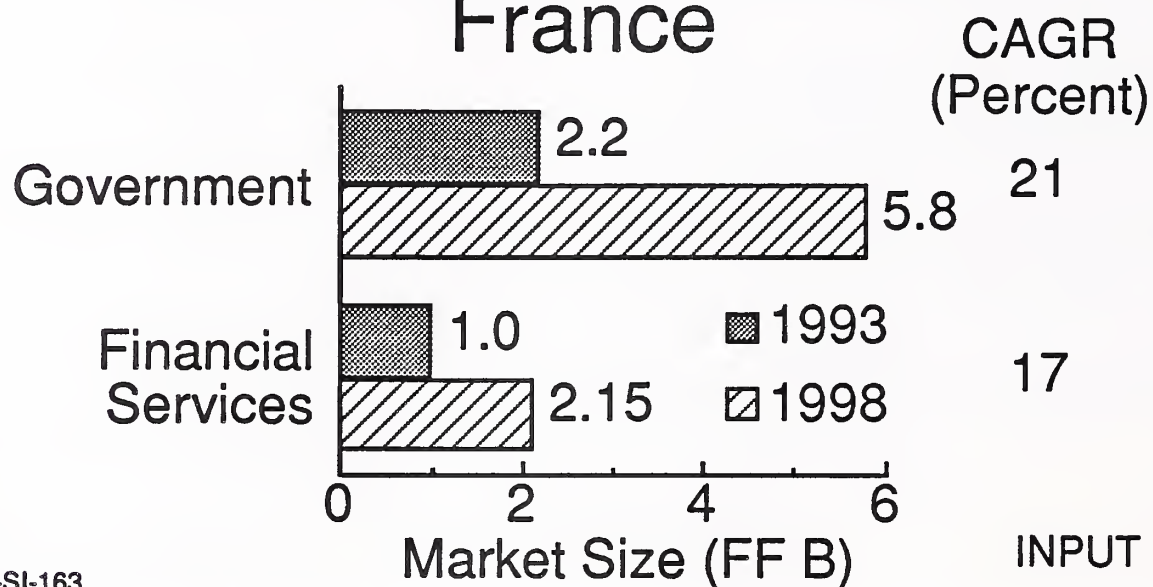
Market, France



E-SI-162

Notes

Systems Integration Industry Sector Forecast France

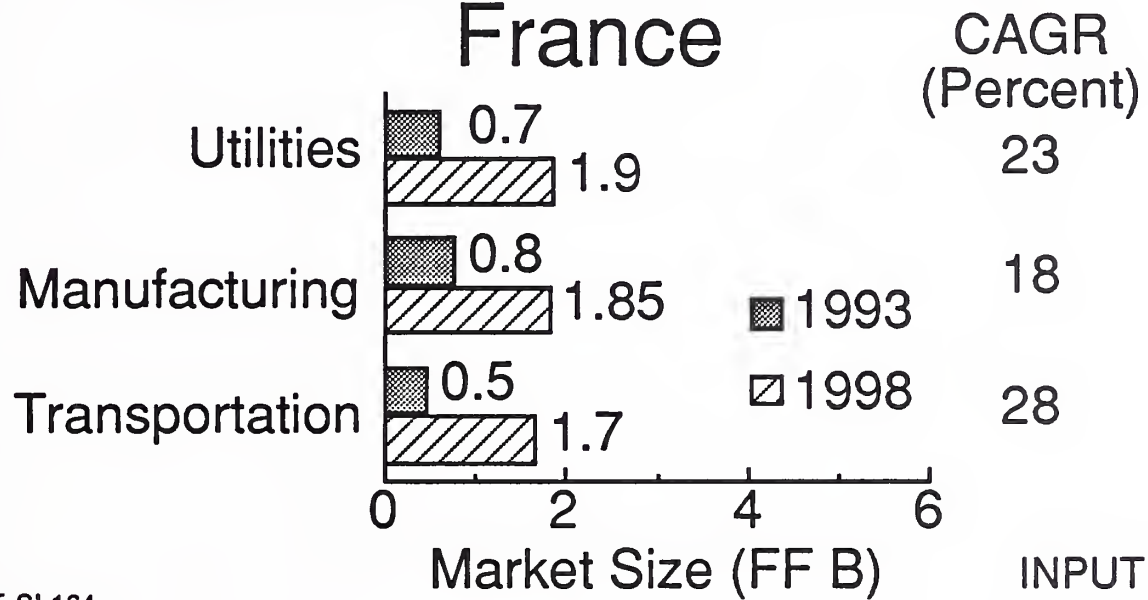


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Notes

Systems Integration

Industry Sector Forecast France



E-SI-164

Notes

Systems Integration

Leading Vendors, France

Company	1992 Est. Rev. (FF B)
Cap Gemini Sogeti	1.00
IBM	0.75
Sema Group	0.35
Andersen Consulting	0.35
EDS-GFI	0.25

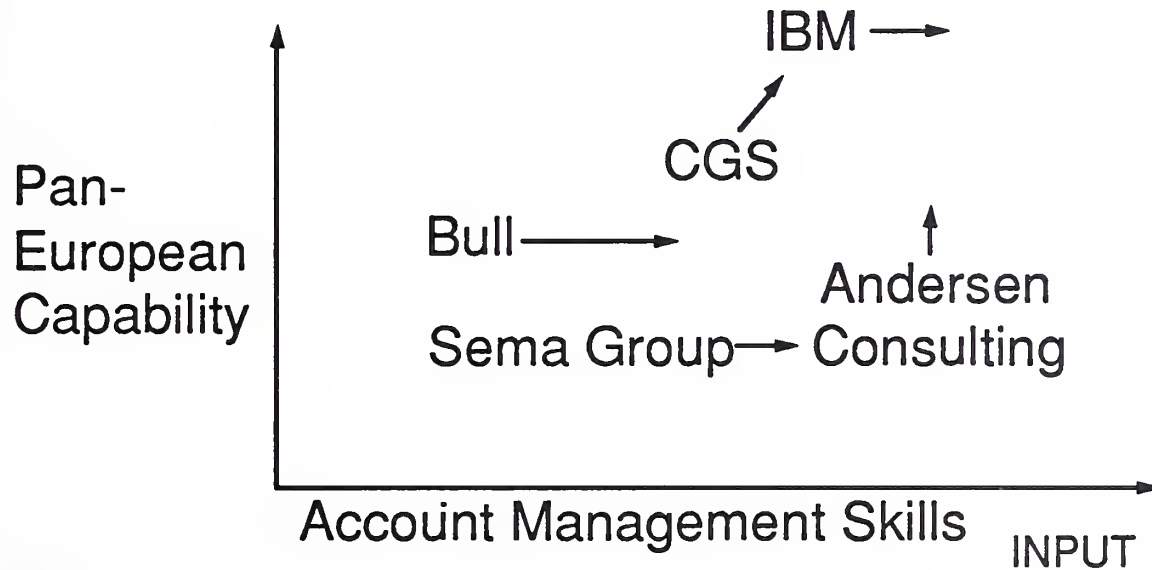
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Notes

Systems Integration, Europe

Vendor Positioning (1)

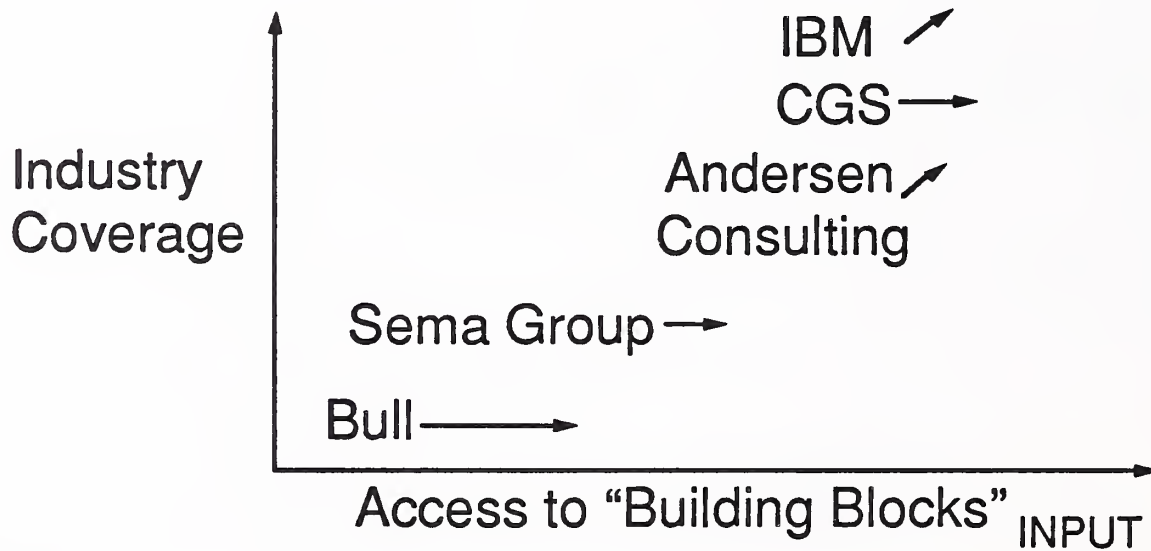


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Notes

Systems Integration, Europe

Vendor Positioning (2)

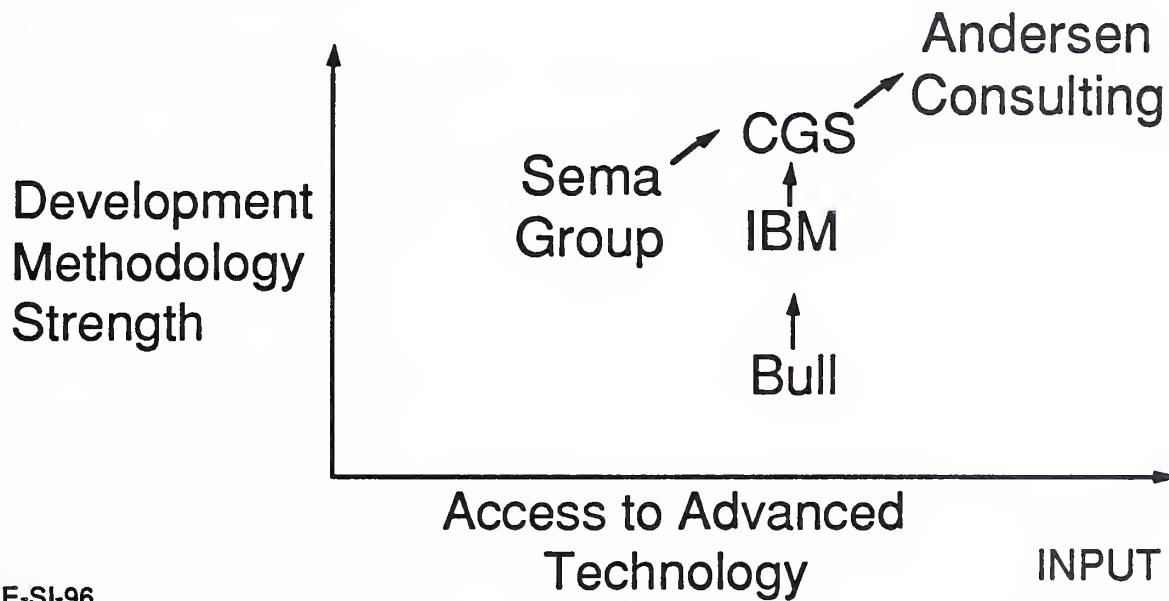


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Notes

Systems Integration, Europe

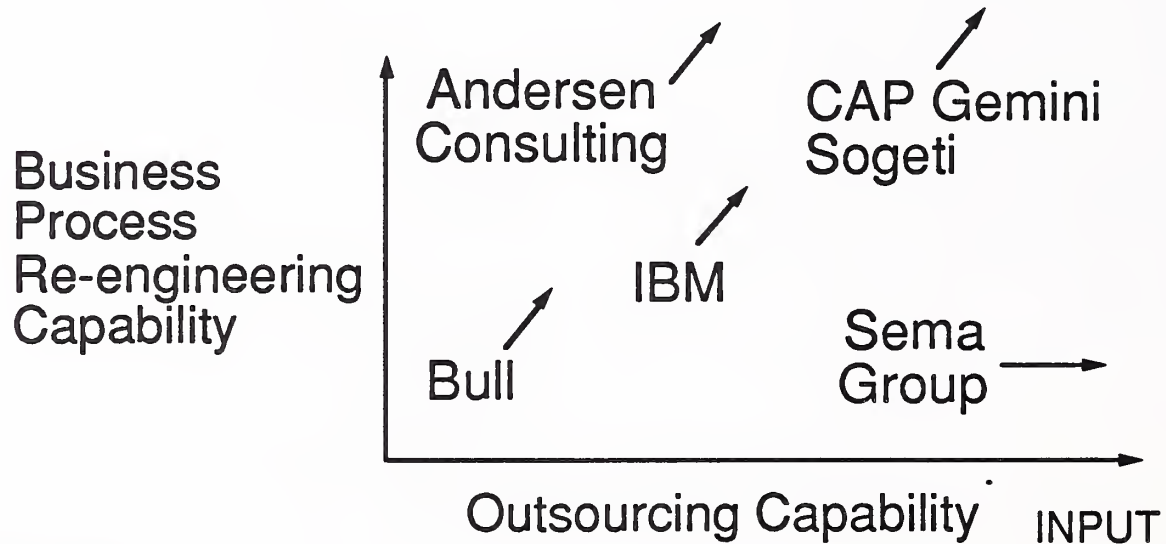
Vendor Positioning (3)



Notes

Systems Integration

Vendor Positioning (4)



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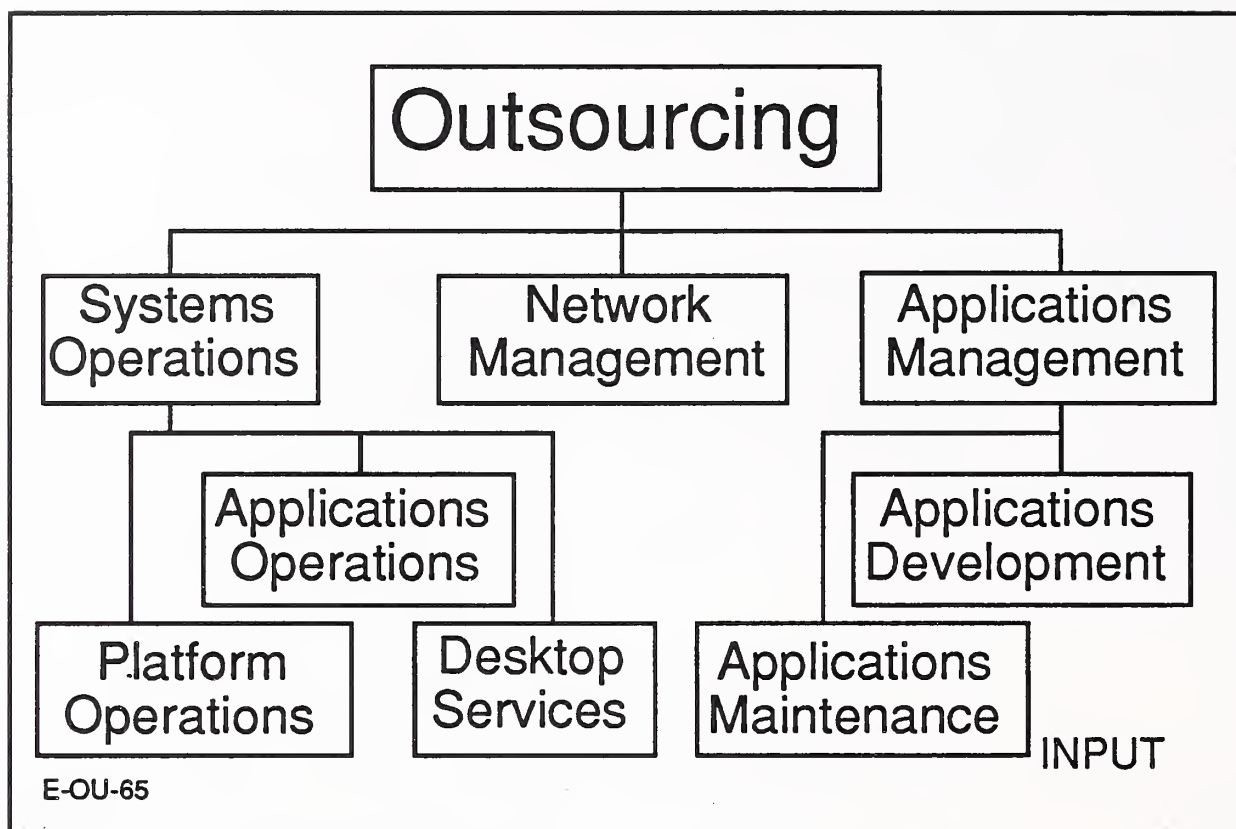
Notes

Outsourcing Growth Opportunities

E-OU-83

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Notes



Notes

Software and Services, Europe

Key User Demands

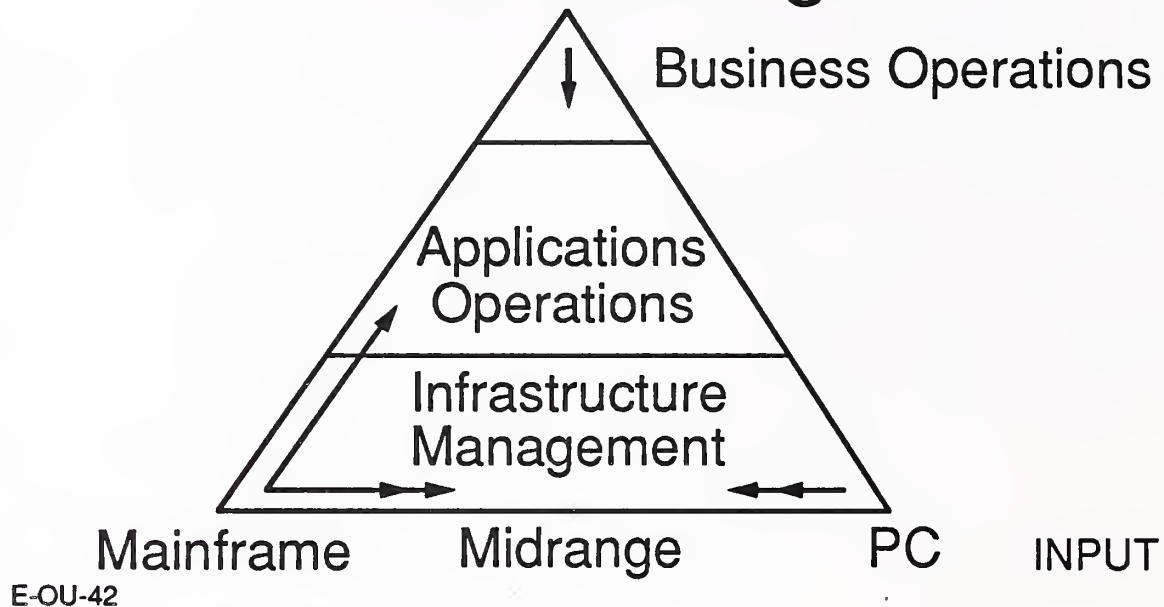
- Value for money
- Cost reduction
- Effectiveness

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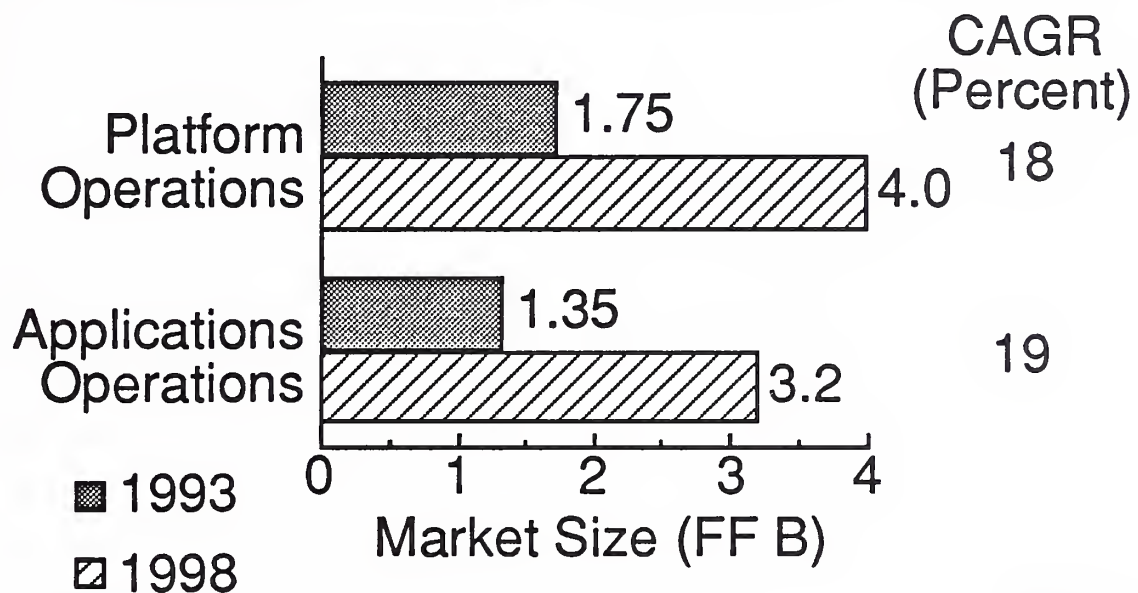
Notes

Evolution of European Outsourcing



Notes

Outsourcing Market, France

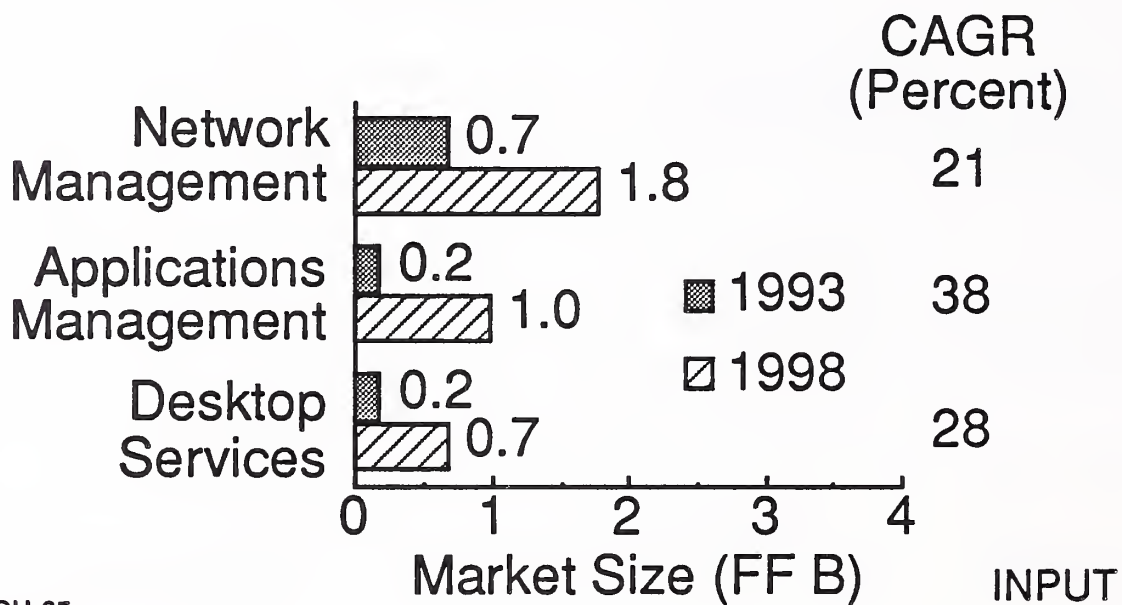


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Notes

Outsourcing Market, France



E-OU-85

Notes

Major Outsourcing Contracts, 1992-1993

Client	Vendor	Contract Value (\$M)	Number of Years
East Midlands Electricity	Perot Systems	600	12
Europcar	Perot Systems	400	10

E-OU-86

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Notes

Major Outsourcing Contracts, 1992-1993

Client	Vendor	Contract Value (\$M)	Number of Years
BHS	CSC	200	11
Kooperativa Forbundet	EDS	≈1,000	10

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Notes

Application Operations, Europe

Reasons for Adoption

Factor	Degree of Imp.
Making IS relate to business needs	High
Making IS more manageable	High
Easier planning of IS costs	High
Need to reduce IS costs	High

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Notes

Systems Operations, Europe

Contract Length by Contract Type

Contract Type	Avg. Contract Length (Years)
Platform Operations	3.5
- Transition Outsourcing	2.5
- Other Platform Operations	4.5
Applications Operations	5

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Notes

User Propensity to Outsource

High

Transition Outsourcing



Application Maint. Mgmt.



Network Mgmt. Desktop Servs.



Platform Operations



Application Operations

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Low

E-OU-66

Notes

Outsourcing, Europe

Principal Reasons for Platform Operations

Factor	Degree of Imp.
Easier planning of IS costs	High
Complexity of technology	High
Difficulty in recruiting staff	Medium
Change in technology used	Medium

E-OU-32

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Notes

Outsourcing Product Lines Hoskyns

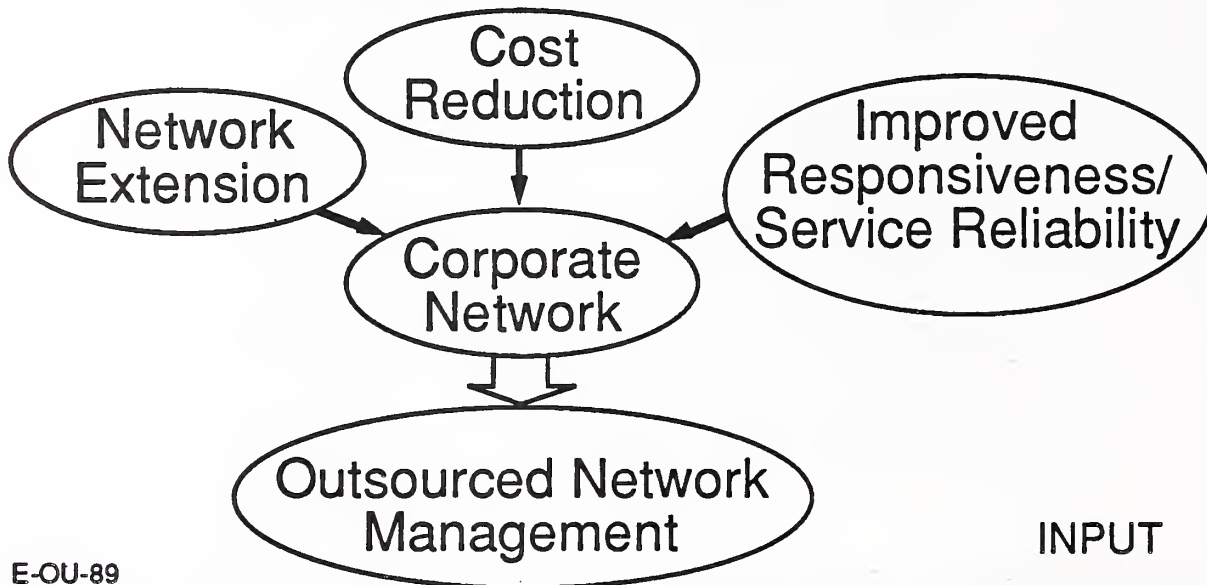
- Midrange
- Mainframe
- Application management
- Desktop services

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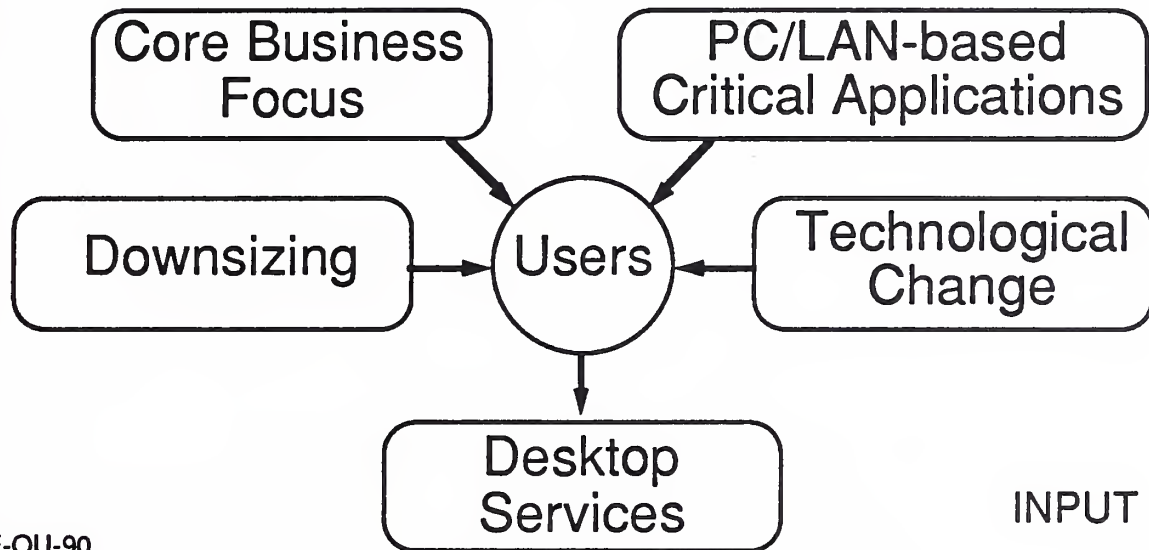
Notes

Network Management Outsourcing Drivers



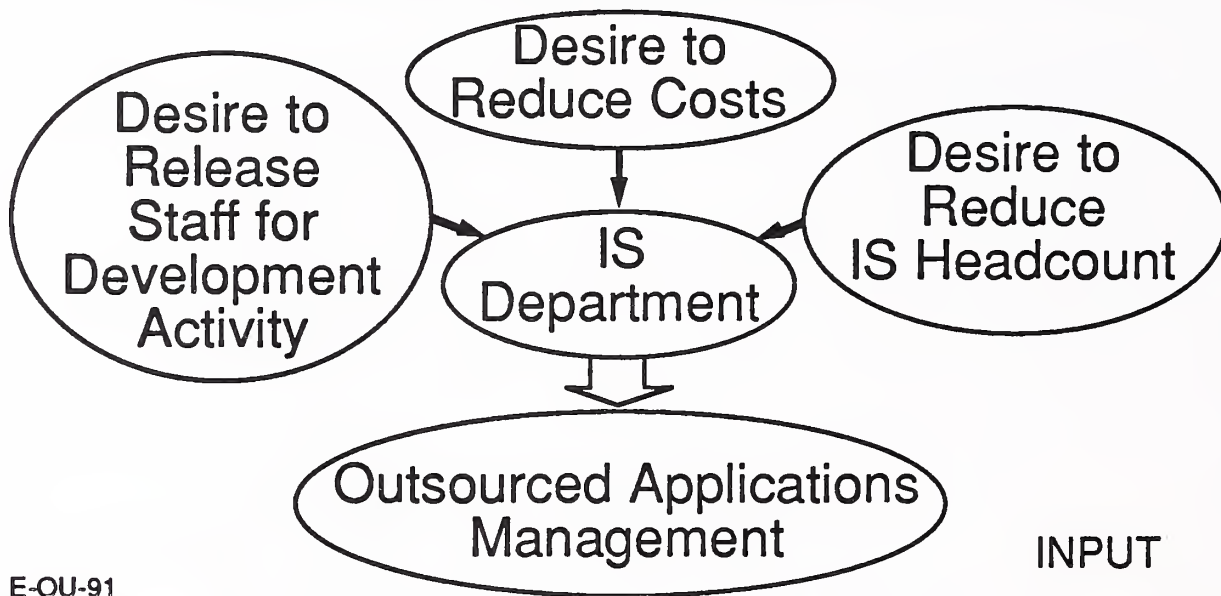
Notes

Driving Forces Desktop Services, Europe



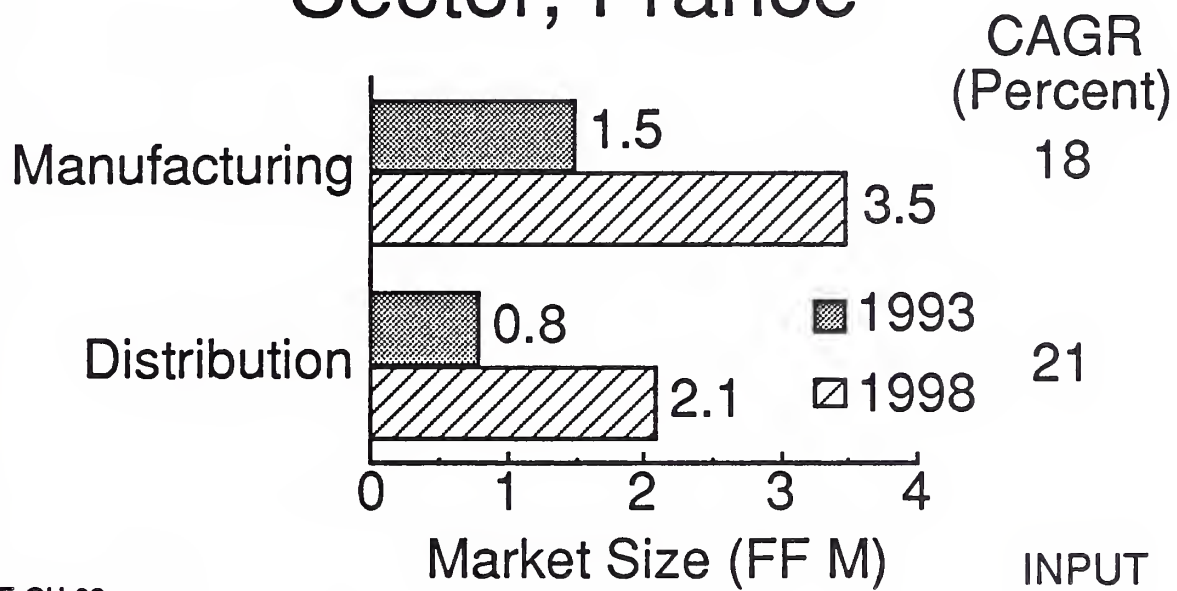
Notes

Driving Forces Applications Management, Europe



Notes

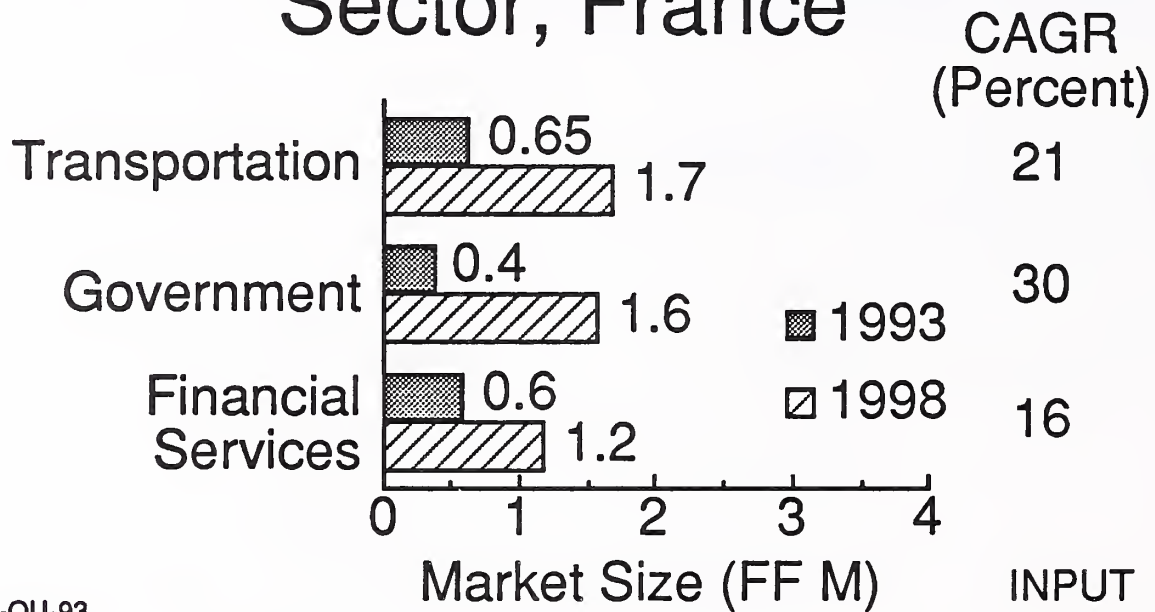
Outsourcing by Industry Sector, France



E-OU-92

Notes

Outsourcing by Industry Sector, France



E-OU-93

Notes

Systems Operations, Europe

Breakdown by Client Turnover, 1992

Turnover of Client Organization	Proportion of Contracts (%)
>\$200 M	70
\$40 - \$200 M	25
<\$40 M	5

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Notes

Leading Outsourcing Vendors France, 1992

Company	Est. Rev. (FF M)
EDS-GFI	750
GSI	350
Télésystèmes	280
IBM/Axone	240
CISI	200

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Notes

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- Outsourcing
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